

**Meeting Agenda
of the
Montana Board of Public Accountants
Virtual
8:04 A.M. – 10:28 A.M.
March 30, 2021**

1. Call to Order - Establish Quorum - Introduction of Board & Staff Members Present (00:00:10)

Mr. John Jacobsen called the meeting to order at 8:04 a.m.

Board Members Present:

Mr. John Jacobsen – Board Chair
Mr. Dan Vuckovich
Ms. Linda Harris
Ms. Cindy Willis
Mr. Mike Huotte
Ms. Kathleen VanDyke
Ms. Ranetta Jones

Staff Present:

Mr. Kevin Bragg – Executive Officer
Ms. Jennifer Stallkamp – Board Counsel
Ms. Barb McAlmond – Administrative Specialist
Mr. Jay Unsworth - Administrative Specialist
Ms. Donna Smillie-Administrative Specialist

Public Present:

Mr. Allen Lloyd – Montana Society of Certified Public Accountants
Ms. Colleen Conrad - NASBA

2. Approval and Tentative Modification of Agenda Order (00:02:05)

MOTION: (00:02:16) Ms. Linda Harris moved to approve the agenda. Ms. Kathleen VanDyke seconded. The motion carried.

3. Review Minutes (00:02:44)

- a. February 5, 2021 FB Meeting

4. Public Opportunity to Comment (00:02:54)

(Presiding Officer Statement) “Under this item, the Board will offer an opportunity to members of the public in attendance to comment on any public matter under the jurisdiction of the Board that is not on the agenda of this meeting. While the Board cannot take action on any issues presented, the board will listen to comments and may ask staff to place the issue on a subsequent agenda. The presiding officer may limit the comment period in order to proceed with the board meeting.”

5. Division Update – Mr. Todd Younkin (00:03:31) There was no division update at this meeting.

6. Board Action (00:03:58)

- a. Non-routine Applications (00:04:03)

- i. Elkins, Rebecca (00:04:08)

MOTION: (00:07:33) Mr. Dan Vuckovich moved to approve the application pending verification of work experience. Ms. Cindy Willis seconded. The motion carried.

- ii. Kattoor Karuvan, Rajan (00:08:08)
MOTION: (00:08:21) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- iii. Shenoy, Durgadas (00:08:48)
MOTION: (00:09:00) Ms. Linda Harris moved to approve the application. Mr. Mike Huotte seconded. The motion carried.
- iv. Agarwala, Jitendra (00:09:27)
MOTION: (00:09:40) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- v. Altman, Samuel** (00:10:00)
MOTION: (00:10:18) Ms. Linda Harris moved to approve the application. Mr. Dan Vuckovich seconded. The motion carried.
- vi. Balasubramanian, Shalini (00:10:53)
MOTION: (00:11:32) Ms. Cindy Willis moved to approve the application. Ms. Kathleen VanDyke seconded. The motion carried.
- vii. Carbo, Caroline (00:12:02)
MOTION: (00:12:07) Mr. Dan Vuckovich moved to approve the application. Mr. Linda Harris seconded. The motion carried.
- viii. Cherian, Sherin Esther** (00:12:39)
MOTION: (00:12:54) Mr. Dan Vuckovich moved to approve the application. Ms. Ranetta Jones seconded. The motion carried.
- ix. Chu, Young Suk (00:13:26)
MOTION: (00:13:34) Ms. Linda Harris moved to approve the application. Ms. Ranetta Jones seconded. The motion carried.
- x. Cichosz, Scott (00:14:09)
MOTION: (00:14:22) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xi. Cimperman, Alexandra (00:16:22)
MOTION: (00:16:37) Ms. Willis moved to approve the application. Mr. Mike Huotte seconded. The motion carried.
- xii. Desai, Salon (00:17:05)
MOTION: (00:17:16) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xiii. Ingwerson, Eric (00:17:48)
MOTION: (00:19:36) Ms. Ranetta Jones moved to approve the application. Ms. Cindy Willis seconded. The motion carried.
- xiv. Johansson, Kari (00:20:09)
MOTION: (00:20:25) Mr. Dan Vuckovich moved to approve the application. Ms. Cindy Willis seconded. The motion carried.

- xv. Kang, Eun Bi (00:25:17)
MOTION: (00:25:34) Mr. Dan Vuckovich moved to approve the application. Mr. Mike Huotte seconded. The motion carried.
- xvi. Kapoor, Rhea (00:26:02)
MOTION: (00:27:06) Ms. Linda Harris moved to approve the application. Ms. Cindy Willis seconded. The motion carried.
- xvii. Karali, Abdullah (00:26:42)
MOTION: (00:27:02) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xviii. Kochuveettil Martin Remin (00:27:30)
MOTION: (00:27:46) Ms. Linda Harris moved to approve the application. Ms. Ranetta Jones seconded. Mr. Kevin Bragg suggested the board move on to the next agenda item while he sent out further information for the board to review.
- xix. Kollamparambil, Saril Kumar (00:31:14)
MOTION: (00:31:26) Mr. Mike Huotte moved to approve the application. Mr. Dan Vuckovich seconded. The motion carried.
- xx. Kumbayil Ramakrishna, Krishnakumar (00:32:01)
MOTION: (00:32:27) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xxi. Larson, Connor (00:34:09)
MOTION: (00:34:12) Ms. Linda Harris moved to approve the application. Ms. Cindy Willis seconded. The motion carried.
- xxii. LNU, Naresh Kumar ((00:34:41)
MOTION: (00:35:00) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xxiii. LNU, R Rahul - This application was not discussed at this meeting.
- xxiv. Luthra, Karan (00:35:40)
MOTION: (00:35:50) Mr. Linda Harris moved to approve the application. Mr. Dan Vuckovich seconded. The motion carried.
- xxvi. Martin, Amanda (00:36:27)
MOTION: (00:37:46) Mr. Dan Vuckovich moved to approve the application. Mr. Linda Harris seconded. After further discussion, Mr. Dan Vuckovich moved to amend his motion to approve the application pending receiving clarification of her experience. Ms. Linda Harris seconded. The motion carried.
- xxviii. McCarty, Kevin (00:41:23)
MOTION: (00:43:24) Ms. Linda Harris moved to approve the application. Mr. Mike Huotte seconded. The motion carried.
- xxx. NAM, YEJIN (00:43:57)
MOTION: (00:44:05) Ms. Cindy Willis moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xxxii. NANJAPPA, JAGADEESHA (00:44:45)
MOTION: (00:45:00) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.

- xxxiv. Nielsen, Niels (00:45:32)
MOTION: (00:47:08) Ms. Linda Harris moved to approve the application. Ms. Kathleen VanDyke seconded. The motion carried.
- xxxvi. PATEL, NITU (00:47:38)
MOTION: (00:47:33) Mr. Dan Vuckovich moved to approve the application. Mr. Linda Harris seconded. The motion carried.
- xxxviii. Saithumammed, Ramod (00:48:23)
MOTION: (00:48:40) Ms. Linda Harris moved to approve the application. Ms. Ranetta Jones seconded. The motion carried.
- xl. Sangani, Preet (00:49:15)
MOTION: (00:49:25) Ms. Cindy Willis moved to approve the application. Mr. Dan Vuckovich seconded. The motion carried.
- xl.ii. Sawant, Tanay (00:49:57)
MOTION: (00:50:11) Mr. Dan Vuckovich moved to approve the application. Mr. Mike Huotte seconded. The motion carried.
- xliv. Schanz, Rachel (00:50:37)
MOTION: (00:53:25) Ms. Linda Harris moved to approve the application pending verification of the correct attestation of hours for the JCCS work experience during the 3-year time frame. Ms. Kathleen VanDyke seconded. The motion carried.
- xlvi. Schlepp, Sarah (00:54:57)
MOTION: (00:55:08) Ms. Cindy Willis moved to approve the application. Ms. Kathleen VanDyke seconded. The motion carried.
- xl.iii. Schmoyer, Colton (00:57:30)
MOTION: (00:57:50) Mr. Dan Vuckovich moved to approve the application. Ms. Kathleen VanDyke seconded. The motion carried.
- l. Sheth, Sonal (00:58:24)
MOTION: (00:58:42) Ms. Cindy Willis moved to approve the application. Mr. Dan Vuckovich seconded. The motion carried.
- lii. Shivashankar, Jayashree (00:59:15)
MOTION: (00:59:30) Mr. Dan Vuckovich moved to approve the application. Ms. Linda Harris seconded. The motion carried.
- xviii. Kochuvelltil Martin Remin (1:00:05) discussion resumed
MOTION: (01:00:36) Mr. Dan Vuckovich moved to approve the application. Ms. Kathleen VanDyke seconded. The motion carried.
- b. Correspondence (01:01:39)
 - i. Course Evaluation and Potential Approval Request – Michelle Keith (01:01:51)
 - ii. Credit Extensions beyond June 30, 2021 (01:11:25)
 - 1. Guarav Baid
 - 2. Saruulzaya Gansukh
 - 3. Sangwoo Na
 - 4. Peng Jing

MOTION: (01:16:35) Mr. Dan Vuckovich moved to grant the four above credit extension request until December 31, 2021 and authorize Mr. Kevin Bragg, Executive Officer, to

review and approve further NTS and Credit extension requests until December 31, 2021 if appropriate upon review. Ms. Kathleen VanDyke seconded. The motion carried.

c. Remote Testing – Collen Conrad, CPA (01:18:06)

i. Presentation from Collen Conrad, CPA - Executive VP and Chief Operating Officer NASBA (01:18:11)

1. Discussion & Questions;
2. Consideration of whether to accept initial remotely proctored testing candidates;
3. Board Action, if any.

MOTION: (01:53:03) Ms. Linda Harris moved to accept the scores that will come as a result of the pilot project as discussed today. Ms. Ranetta Jones seconded. The motion carried.

7. MSCPA Update (01:54:45)

- a. Allen Lloyd

8. Board or National Committee Reports (02:00:37)

- a. NASBA (02:01:02)

9. Executive Officer Report (02:02:08)

- a. FY21 Financial Reports (02:02:14)
- b. CY 20 Licensing Statistics
- c. Legislative Updates (02:03:35)

10. Legal Report (02:10:30)

- a. Screening Panel Action Report
- b. Adjudication Panel Action Report
- c. Legal Unit

11. Future Meetings (02:10:53)

- a. Scheduling of Next Meeting
 - May 13, 2021
 - June 29, 2021 - Applications
 - August 27, 2021
 - September 28, 2021 – Applications
 - November 9, 2021
 - December 14, 2021 – Applications

12. Adjourn (02:13:41) Mr. John Jacobson adjourned the meeting at 10:28 a.m.

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New agenda items may be added or removed up to “three business days” before the meeting. For the most accurate agenda, please consult the web site at www.publicaccountant.mt.gov. The board may reorder the agenda at the beginning of the meeting.